



BALTCARE

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Chairman of the Board of Lithuanian Medical Tourism Cluster "LitCare"
President of Lithuanian Medical Tourism Association "Medical Lithuania"
President of Association of Lithuanian Private Healthcare Institutions
Director of JSC SK Impeks Medical Diagnostic Center

15/03/2016
LATVIA, RIGA

BALTIC HEALTH
TOURISM CLUSTER
'BALTCARE'
BALTIC
POWER

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Baltic Healthcare: Value Proposition

European (high) level safety & quality HC services

Highly skilled (in EU recognized) HC professionals

Multilingual medical staff

Personal attention / personalized medicine

Modern technologies and treatments

Absence of waiting lists

Reasonable and affordable (competitive) prices of HC services

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Priority domains of health services for BALTCARE market

Health check – ups and diagnostics

Surgery

Odontology

Rehab. & Med SPA

Beauty & Wellness

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Price competitiveness & cost saving value, USD

SERVICE / COUNTRY	GERMANY	CZECH REPUBLIC	POLAND	TURKEY	ISRAEL	BALTICS (AVG)
Breast augmentation	7,500	4,312	3,712	3,586	4,037	3,404
Liposuction	4,499	3,054	2,800	2,207	2,500	2,035
Cataract surgery	1,973	9,21	1,741	1,673	3,500	813
Knee joint arthroplasty	11,375	-	8,348	7,175	-	6,047
Knee joint arthroscopy	2,625	-	912	-	3,200	937
Haemorrhoids removal surgery	3,400	2,888	1,026	1,925	2,325	875
Varicose veins surgery	3,150	3,588	751	2,100	-	1,016
Dental implantation	3,000	1,950	973	970	2,000	1,011

Sources: www.treatmentabroad.com
<http://www.thefhealthclinic.eu/en>
<http://www.medicinesinestonia.eu/en>
<http://www.greetingstomlatvia.lv>

<http://www.liposuction-abroad.co.uk>
<http://www.whitclins.com>
<http://www.premiummedicaltravel.com>

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BALTCARE: potential target markets

I

- Nord: Finland, Sweden, Norway, Denmark
- UK, Ireland

II

- East: Russia, Belarus, Ukraine

III

- West: Germany, Poland, Spain
- Israel, USA

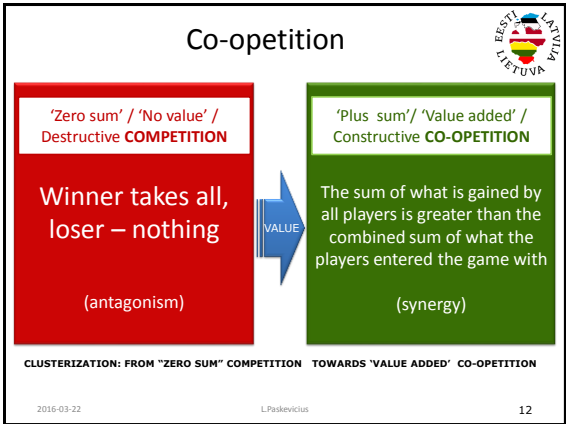
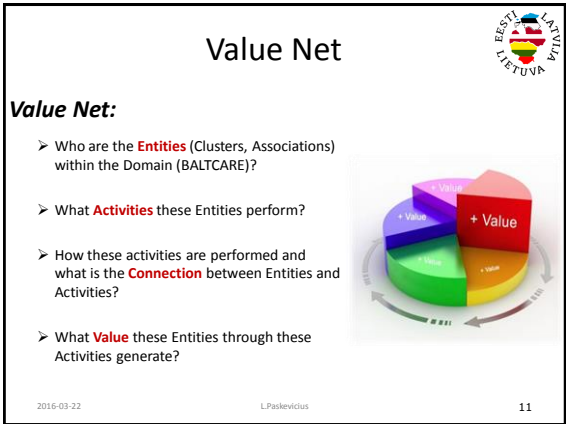
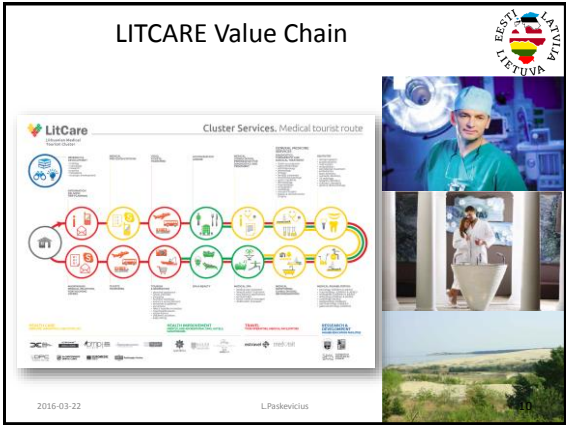
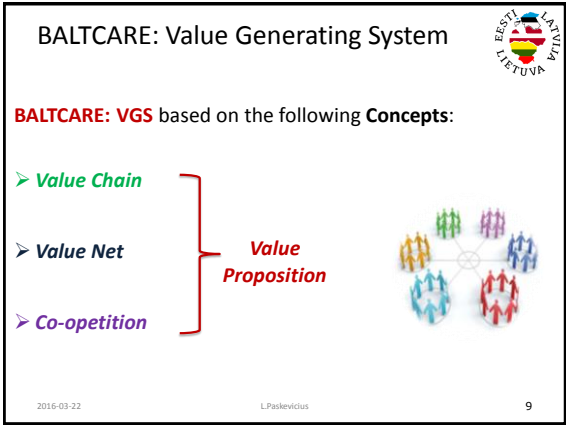
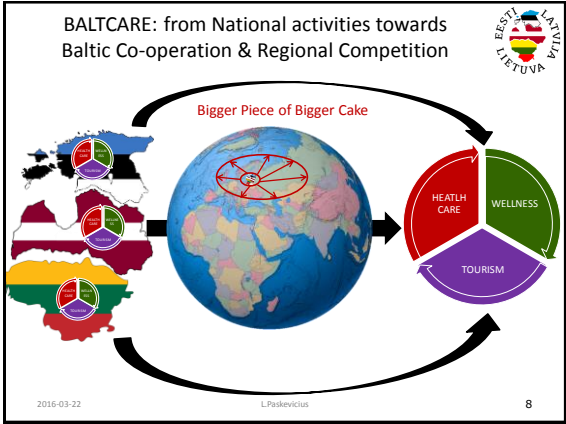
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- South: Kazakhstan, Azerbaijan, Georgia...

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BALTCARE VALUE PROPOSITION

HIGH VALUE

QUALITY HEALTH SERVICES

AT A REASONABLE PRICE !

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BALTCARE

BALTCARE – an associated *Partnership* of the leading national Health / Medical Tourism Clusters and Associations (“*Partners*”) located in Baltic States, with the *Purpose* to enhance global competitiveness of the Baltic Region Health Tourism (“*HT*”) sector, increase an export of Healthcare, Wellness, Wellbeing and other/related HT services on *Regional, State and Institutional levels* by:

- Enhancing *Trust* and *Co-opetition* among the Partners and their Members
- Improving *Quality* (Accessibility, Safety, Effectiveness, Efficiency, etc.) of the services provided to clients / patients
- Joined *Marketing* resources and efforts to effectively promote Cluster’s services to the potential target markets

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PRINCIPLES AND VALUES OF THE BALTCARE

I. Patient centeredness: benefits for both, international and national patients

II. Quality & Safety

III. Co-opetition (co-operative competition)

IV. Mutual Trust and Respect

V. Value net (value enhancing networking)

VI. In(ter)dependence

VII. Effectiveness & Efficiency through economies of scale and scope

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Memorandum of Understanding

MEMORANDUM OF UNDERSTANDING
BETWEEN
THE LITHUANIAN MEDICAL TOURISM CLUSTER,
THE LITHUANIAN RESORTS ASSOCIATION,
THE LATVIAN HEALTH TOURISM CLUSTER,
THE LATVIAN RESORTS ASSOCIATION, AND
THE ESTONIAN HEALTH TOURISM CLUSTER

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MoU: Purpose & Goals

Purpose and Goals:

to promote the development and enhance global competitiveness of the Baltic Region HT sector by strengthening the cooperation between the national level MT clusters and associations in the Baltic States leading to the establishment of the Baltic HT Cluster that is expected to eventually result in:

➤ Substantial increase of HT services export, having overall positive impact to the Baltics economies

➤ General development of the Baltic HT sector in terms of enhanced accessibility, quality, safety and cost-effectiveness of HT services for both foreign and local patients

➤ Improved competitiveness and financial performance results of the Participants’ members

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MoU: Aims & Objectives (1)

Aims and Objectives:

➤ To promote HT within all the BS in common, and to develop medical and wellness tourist flows to the Baltic States and among the BS:

➤ to enhance destination promotions with the goal of increasing the number of medical and wellness tourists to the Baltic Region

➤ to increase export of health and wellness, and other/related HT services provided in the Baltic Region to foreign patients / clients;

➤ To improve their own HT services, develop accessibility

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MoU: aims & objectives (2)

- To enhance a **co-opetition** by promoting **co-operation** and partnership among Participants on regional level while developing the Baltic HTC but also encouraging healthy **competition** on an institutional level while providing healthcare and wellness, and other/related HT services:
 - to proactively **enhance expertise** in HT, to develop **mutual respect, common understanding, teamwork, and friendly relations** among the Participants
 - to facilitate, on a mutual basis, **the exchange of experts** in the field of HC, wellness and HT aiming to get acquainted with HC, wellness and MT issues, and **share know-how** in the field of HT
 - To **encourage study visits** of HT experts and **sharing expertise** among the Participants
 - To encourage **quality improvement activities** among their members to ensure high quality and safety of the services provided to the national and international patients / clients

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MoU: aims & objectives (3)

- to encourage the **establishment of relations** between national tourism and HC institutions and organizations, approved destination country tour operators, hotel networks, SPA as well as providing assistance to other types of activities aiming to increase health tourists flow
- to **promote the exchange of information concerning laws and regulations** applicable to the field of HT, **statistical information**, educational programs, **scientific research, certification** in the field of HT
- to co-operate in the fields of HC, wellness and tourism as well as exchange of information aiming **to raise funds and draw up investment projects** of common interest and to implement them by establishing joint ventures
- To assist each other in **organizing meetings of experts** and business people in HC, wellness and HT spheres

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MoU: meetings, review, amendments

- To accomplish these objectives:
 - The Participants will **establish proper management instruments and allocate experts** to the working groups and management structures
 - The Participants **will meet at least 2 times a year** for the purposes of planning, monitoring and evaluating activities of Baltic HTC
 - **Decisions** at the meetings will be decided by **consensus**
 - The terms and conditions of this MoU shall be **reviewed at least every 3 years** or upon request by any of the Participants
 - Amendments to this MoU will be in writing, mutually agreed to by the Participants

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MoU: Further steps

FURTHER STEPS:

- To establish **Baltic HTC** by 01/09/2016
- To develop a Baltic HTC **Strategy (2017-2020)** by 01/10/2016
- To frame a Baltic HTC **Program (2017) (actions plan)** by 01/11/2016
- To appoint competent **experts** to the established management structures and working groups
- To raise national and international **funds** for the above mentioned activities

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Priority areas for co-operation

Priorities for co-operation activities (Centres of Excellence, Centres of Business):

- I. First level area (priority #1):** common interest for all three Parties
- II. Second level area (priority #2):** common interest at least for two Parties
- III. Third level area (priority #3):** special interest at least for one Party

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Development of the BALTCARE Concept

EST HT / MT
Feasibility study | Strategy | Program

LV HT / RA
Feasibility study | Strategy | Program

LT HT / RA
Feasibility study | Strategy | Program

IV. RESULTS
BALT HTC Program
BALT HTC Strategy
BALT HTC Feasibility study

III. PROCESSES
II. STRUCTURE
I. VALUES

Program (actions plan)
❖ Fundraising strategy
❖ Marketing strategy
❖ Communication strategy
❖ Cluster managing organization
❖ Cluster structure
❖ Values & Principles

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Development of BALT CARE structure

I. Stage (2016 – 2018):
Cluster – non (semi) structured
Network of MTA, RA, MT business
enterprises

II. Stage (2019 -):
Cluster – structured
Confederation of MTA, RA, MT business
enterprises

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Futher steps: development of Framework of
the BALT CARE Management Structure (2019 -)

GENERAL MEETING OF THE MEMBERS
(Highest Management Body)
(Conceptual Level: Values, Principles, Mission, Vision)

MANAGEMENT BOARD / STEERING COMMITTEE
(Strategic Level: Strategy / Sustainability)

CEO / MANAGING DIRECTOR
Full - time employee
(Operational Level: Program / Actions plans)

BACK OFFICE
Full time employee Secretary
(Technical support)

WORKING COMMITTEES
(Product development, Ethics & Conflict
resolution, Marketing, etc.)
(Day-to-day activities)

AUDIT SERVICES
(Financial, Performance)

ACCOUNTING SERVICES

CLUSTER FACILITATORS
National Level: Enterprise
Lithuania, Latvia, Estonia
(Fundraising, Consulting, Mediation)

CLUSTER CO-ORDINATOR
Regional level, Outsourced
PMA
(PM, Fundraising, Mediation)

OUTSOURCED SERVICES
PARTNERS

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Futher steps: development of Framework of the
BALT CARE Management organization (2016 -2019 -)

Network of Association, MT business enterprises:

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Futher steps: development of Framework of
the BALT CARE Management Structure (2019 -)

BALTIC HEALTH TOURISM CLUSTER

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OUTSOURCED SERVICES
PARTNERS

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Funding of the BALT CARE
Establishment & Activities

➤ BALT CARE establishment & start-up:

➤ 80% of budget funds – contributions from
the Partners (Membership fee)

➤ 20% of budget funds – National funding
instruments

➤ BALT CARE management and activities:

➤ 50% of budget funds – contributions from
the Partners (Project based funding)

➤ 50% of budget funds - EU funding /
other funding sources

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